5.7 Outlet Structure Changes

This option allows the user to add new outlets and delete closed outlets, as well as to track outlet mergers, outlets that change to administrative entities, and outlets that move to new administrative entities. The structure changes are tracked automatically in a historical file as the user enters data, so there is little additional burden to the WinPLUS user.

5.7.1 Edit Checking During Outlet Structure Changes

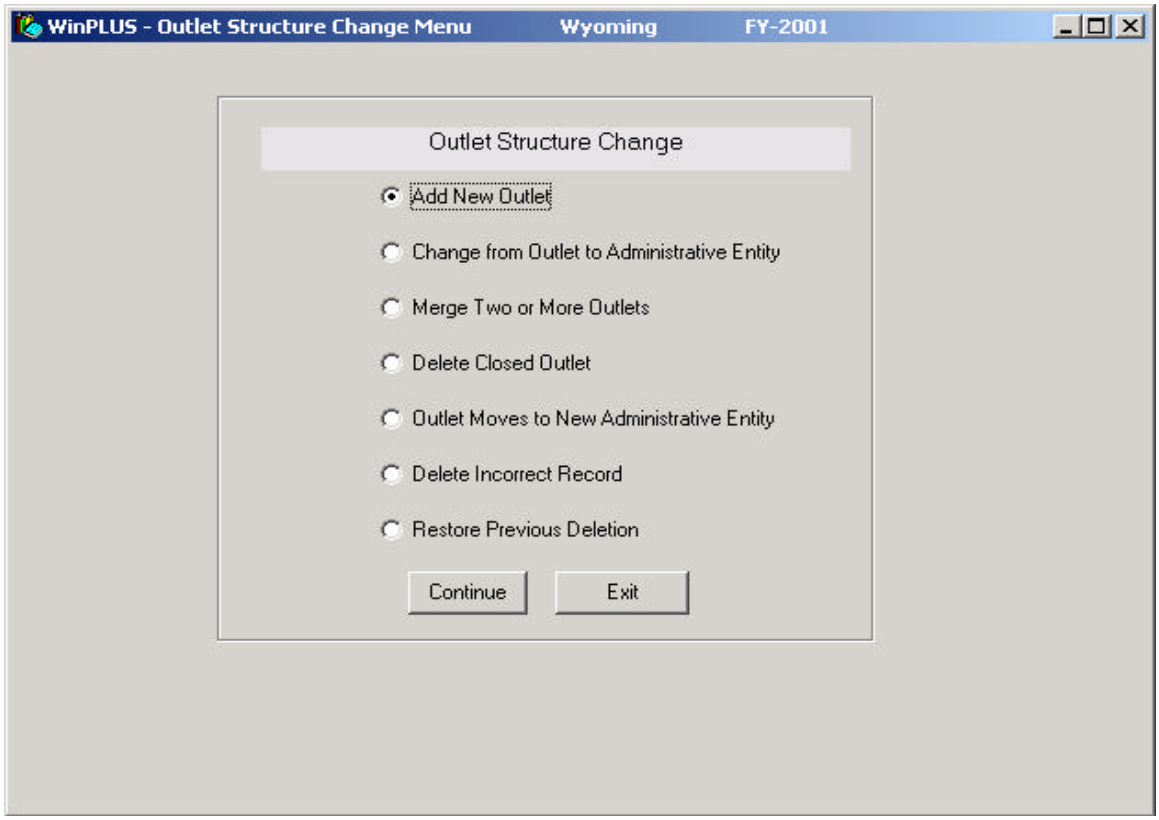
During 'Outlet Structure Changes', interactive edit checks are limited to invalid entries (e.g., invalid codes in fields such as Interlibrary Relationship, Legal Basis, and Administrative Structure; alphabetic entries in numeric fields; and totals that are not equal to the sum of their parts when all parts are greater than or equal to 0).

Invalid entries are not permitted under any circumstances. WinPLUS software uses a -2 to indicate a data element that has been left blank. The user **must** make a valid entry (i.e., -1, 0, a positive number, or alphanumeric data, as appropriate). Estimates can be used if exact data are not available. The following responses are acceptable to WinPLUS:

-1	"-1" means "We don't know the answer, don't collect this data, or can't get the data right now**."**
0	Zero means "we have none of this item" (e.g., the library does not maintain a video collection).
Any positive number for numeric data elements	Enter the appropriate numeric data for the data element.
Alphabetic and/or numeric data for alphanumeric data elements	Enter the appropriate alphabetic and/or numeric data. Some data elements require codes (e.g., Interlibrary Relationship Code = HQ, ME, or NO). See appendices E and F.

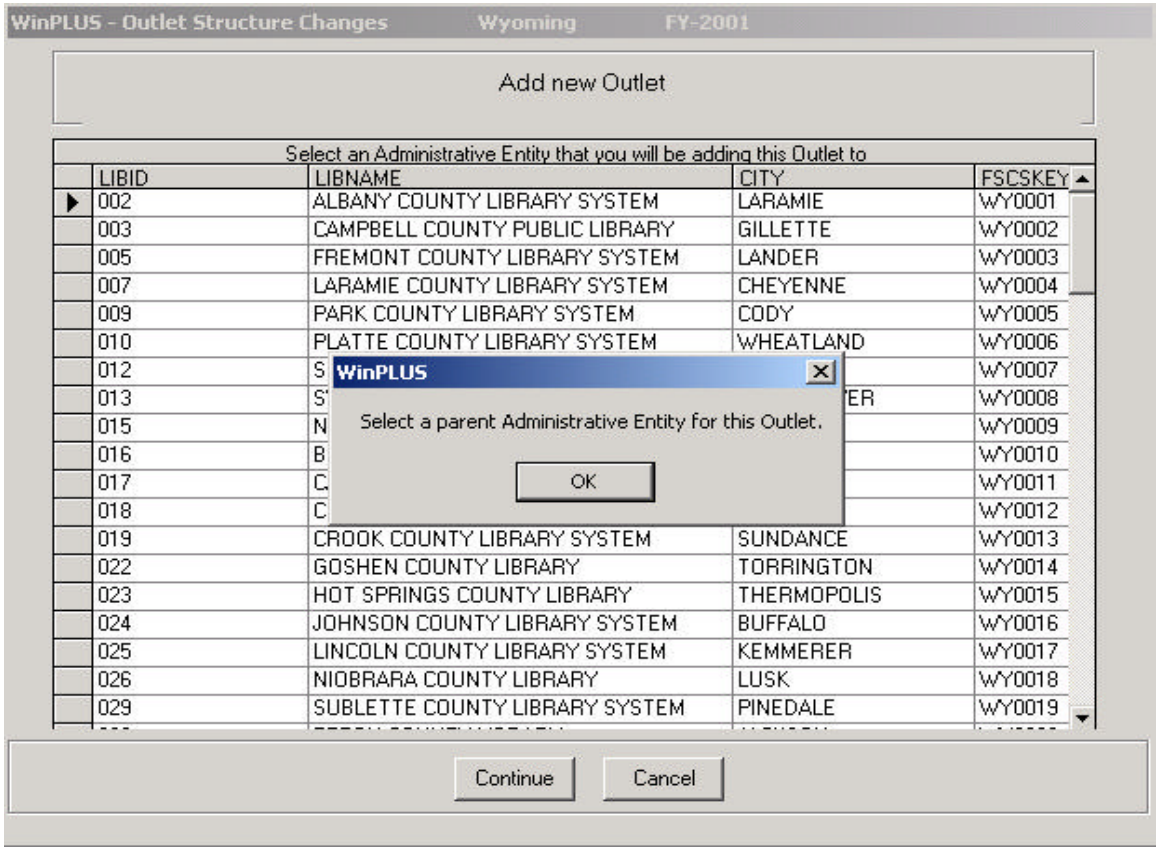
Outlet Structure Change Menu

To access the 'Outlet Structure Change Menu', select 'Outlet Structure Changes' from the WinPLUS Main Menu. This menu gives the user options for making structural changes to outlet records.

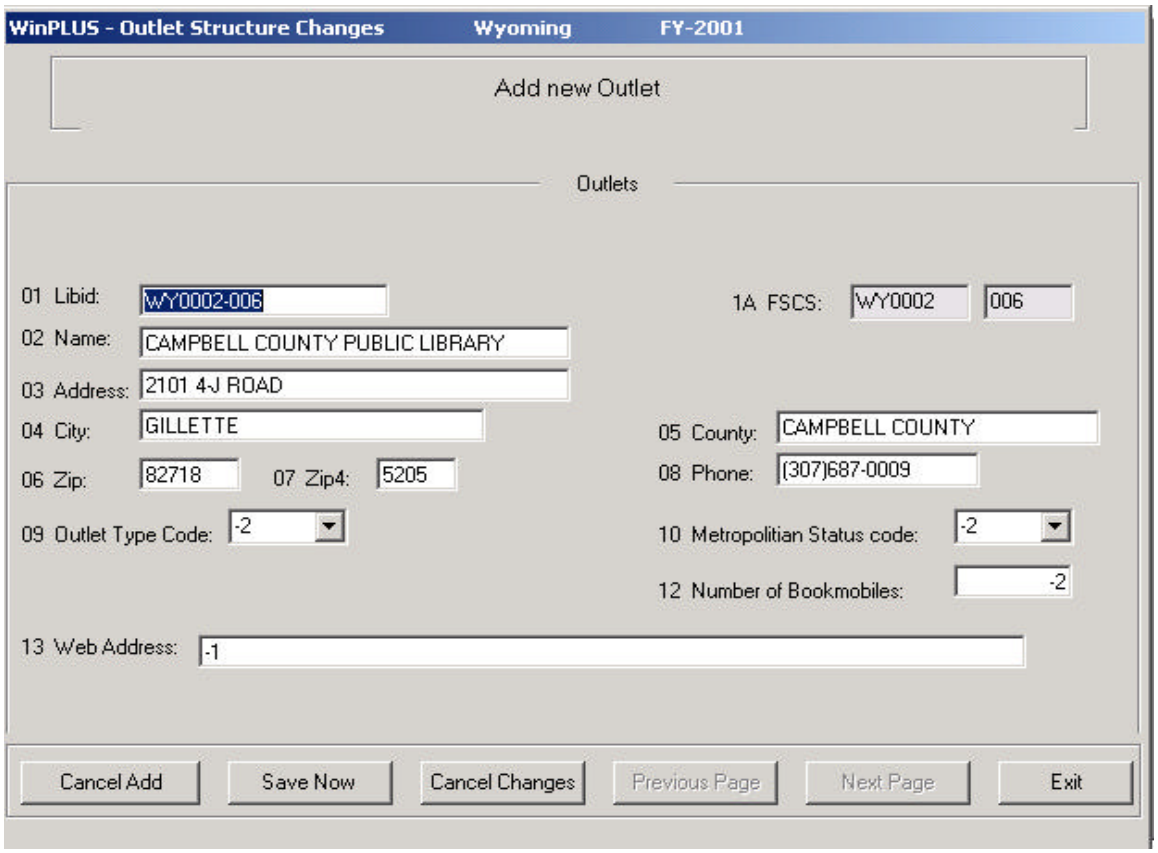


5.7.2 Add New Outlet

To add a completely new outlet record, select 'Add new outlet' from the 'Outlet Structure Changes Menu'. A window prompts the user to 'Select a parent Administrative Entity for this Outlet'.



Select the administrative entity that will be the parent to the outlet by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Select 'Continue' to proceed. Next, the 'Add New Outlet' data entry screen window is displayed with the pop-up message 'Do you want to replicate the Parent Administrative Entity?'

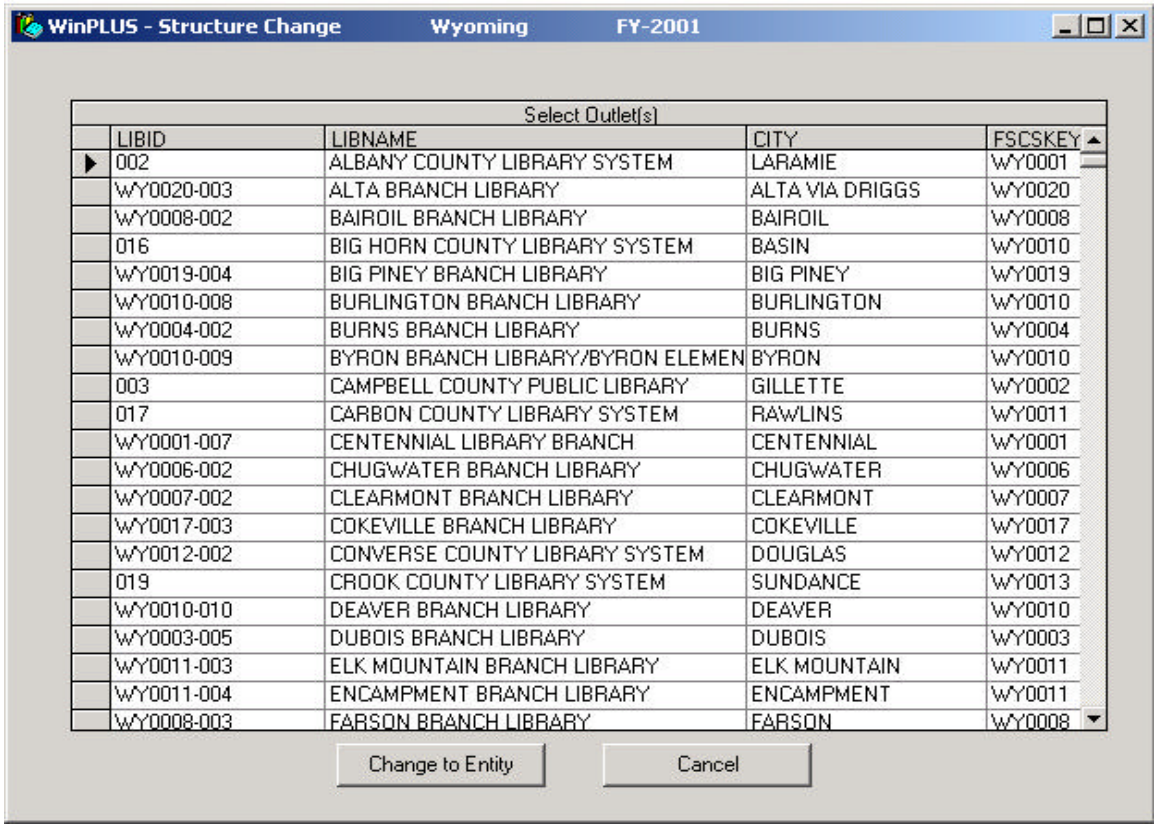


Select 'Yes' to fill in the outlet's name, address, zip code, county, and telephone number with the data in the administrative entity record. (Note: The cursor is positioned at the LIB ID# data element. If the user does not enter a LIB ID#, WinPLUS automatically generates one based on the FSCS ID# of the parent administrative entity, with the addition of a 3-digit suffix that uniquely identifies the outlet. WinPLUS automatically generates the FSCS ID#.)

Use 'Tab' or 'Enter' to move to other data elements. Enter data for elements 09 through 13 now, or later from WinPLUS Main Menu option 'View/Update Administrative Entity or Outlet Record(s)'. Select 'Save Work' or 'Exit' to save the changes, or 'Cancel Add' to cancel the procedure.

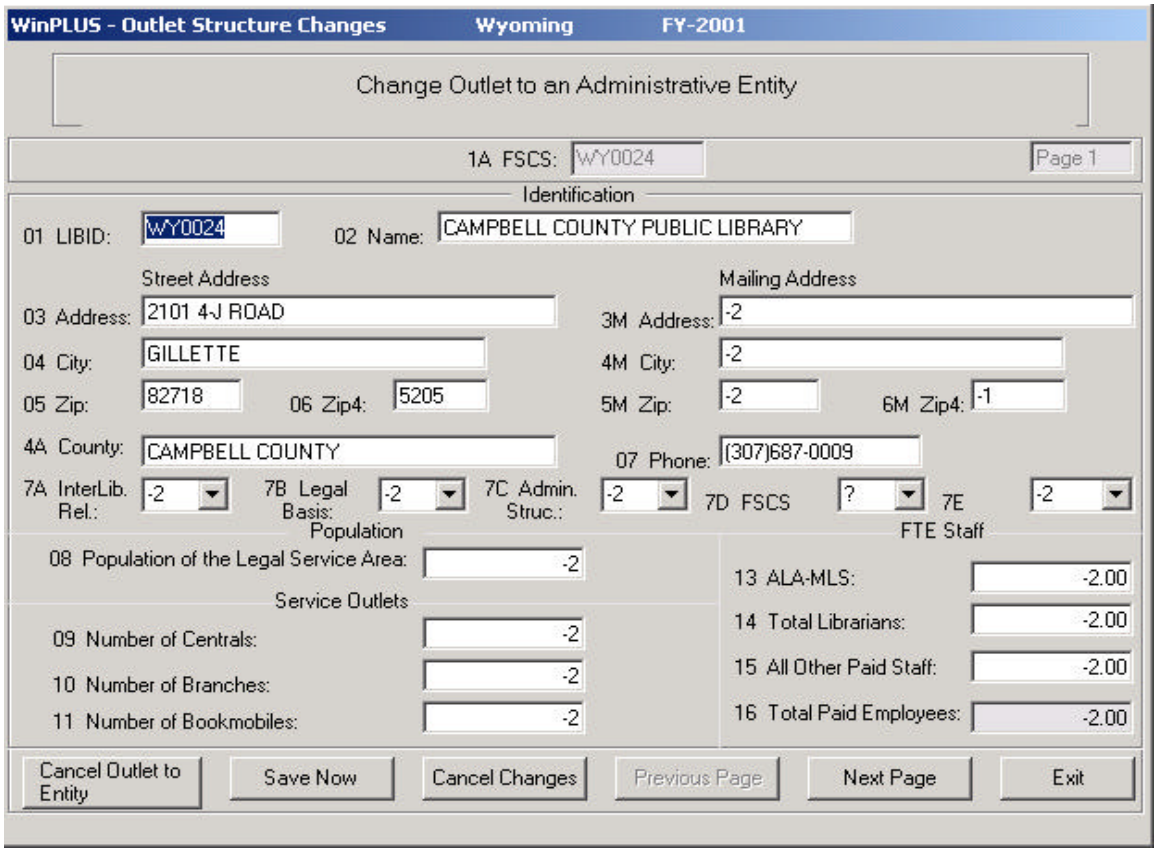
5.7.3 Change from Outlet to Administrative Entity

To change from an outlet to an administrative entity, select 'Change from Outlet to Administrative Entity' from the 'Outlet Structure Changes Menu' and 'Continue'. (Note: The new administrative entity is assigned a new FSCS ID#. The number assigned is the next highest FSCS ID# from the one previously assigned. The old outlet is automatically tracked in the historical database under its old FSCS ID# and the new administrative entity's FSCS ID#.)



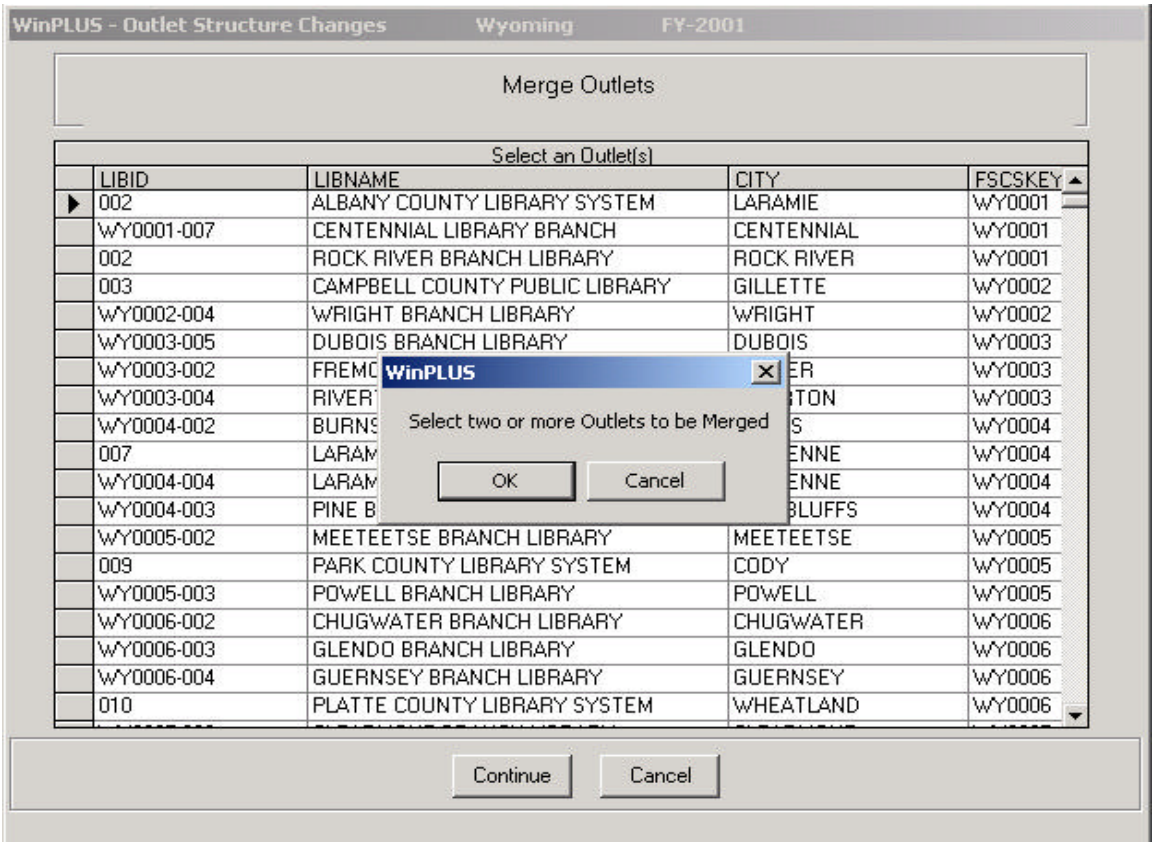
A window listing all outlets is displayed. Select the outlet that will be changed to an administrative entity by clicking on the gray box to the left of the names. *The entire row must be highlighted*. Select 'Change to Entity' to continue with the structure change. The following message will be displayed: 'Change This Outlet to an Administrative Entity with a new FSCS ID#?' Select 'Yes' to continue.

If you select 'Yes', the 'Change Outlet to an Administrative Entity' data entry screen is displayed. Please enter data for the newly created administrative entity. Select 'Save Work' or 'Exit' to save the new administrative entity record, or select 'Cancel Outlet to Entity' to cancel the structure change.

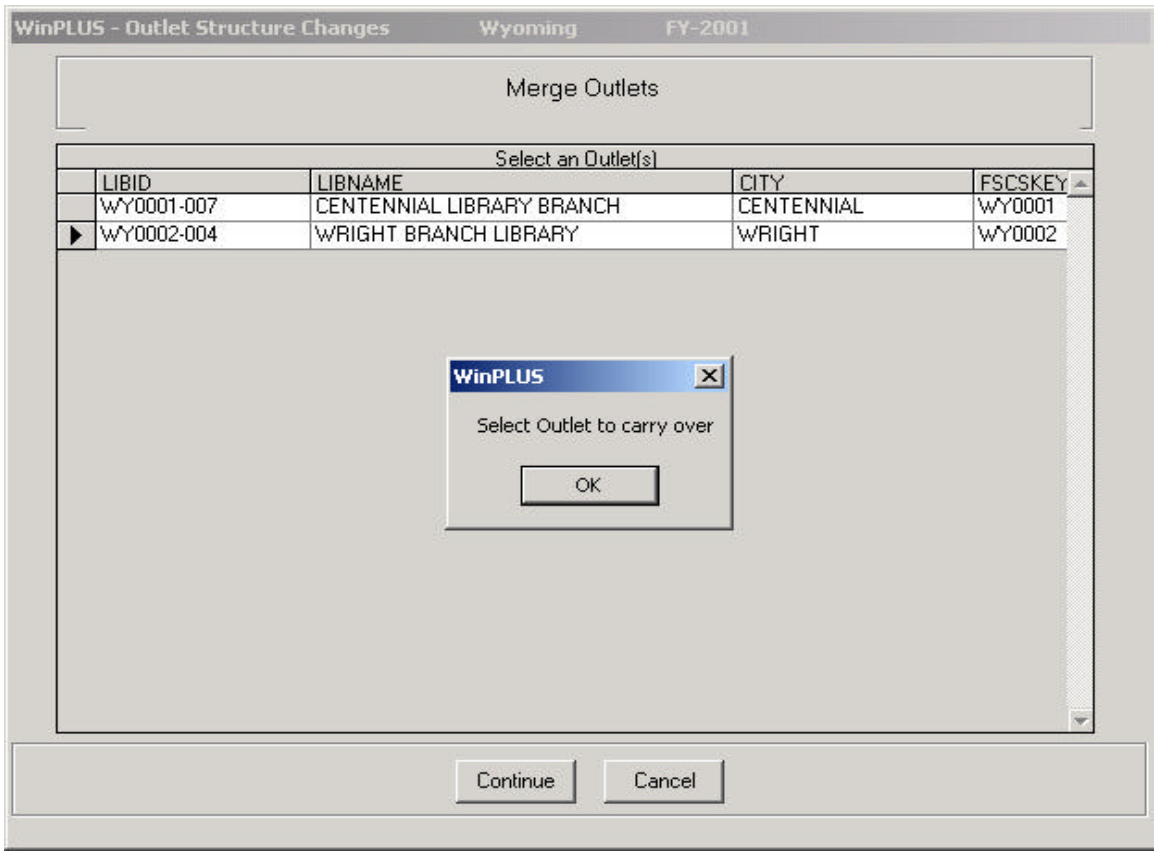


5.7.4 Merge Two or More Outlets

To merge two or more outlets, select 'Merge Two or More Outlets' from the 'Outlet Structure Changes Menu' and select 'Continue'. (Note: WinPLUS automatically assigns the new outlet a new FSCS ID#. The old outlets that merged are tracked in the historical database under their old and new FSCS ID#s.) Next, you will be prompted to 'Select two or more Outlets to be Merged' from a list of all outlets.



Select the outlet records to be merged by clicking on the gray box to the left of the names. *The entire row must be highlighted.* If you continue, a message will ask 'Do you want to carryover one of the outlets?'



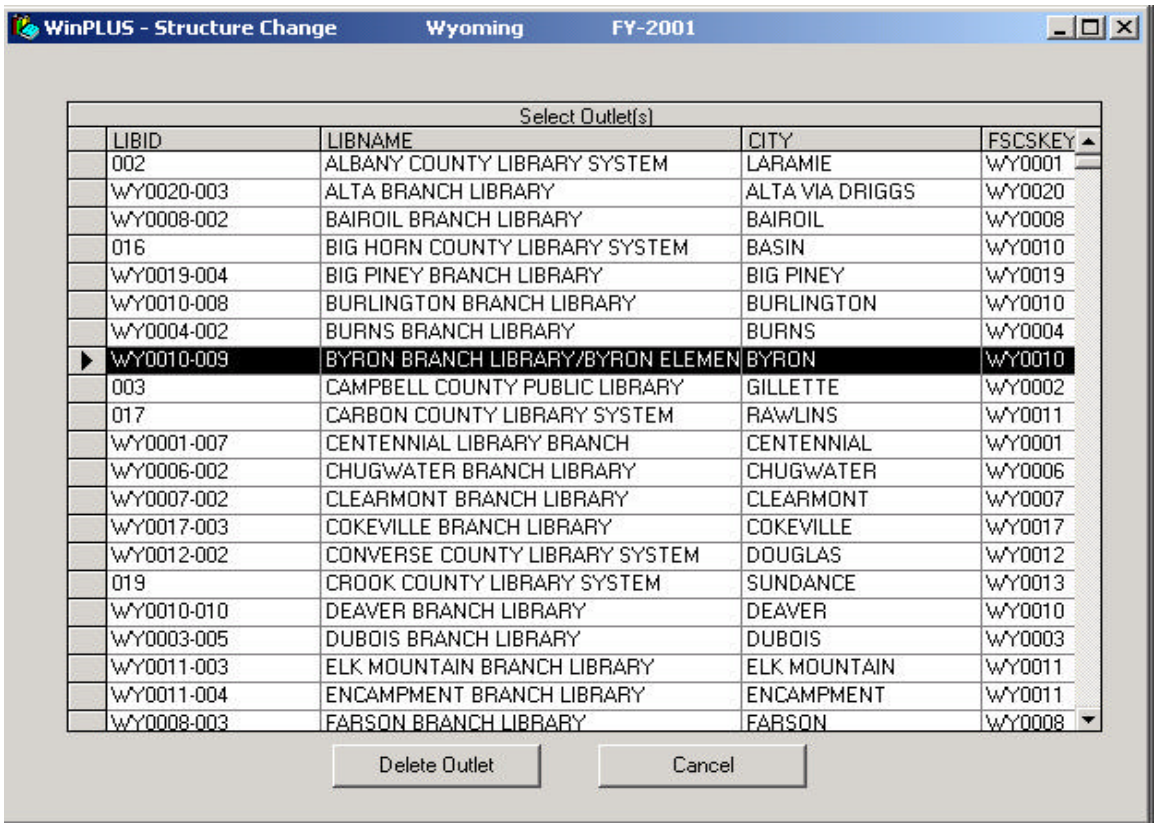
If you choose 'Yes', you will be prompted to 'Select Outlet to carry over'. (Note: Information from this outlet will be inserted in the newly merged outlet.)

After you select the outlet to carry over, a list of all administrative entities is displayed with the message 'Select a parent Administrative Entity for this Outlet.' Select the administrative entity for the new outlet by clicking on the gray box to the left of the names. *The entire row must be highlighted*.

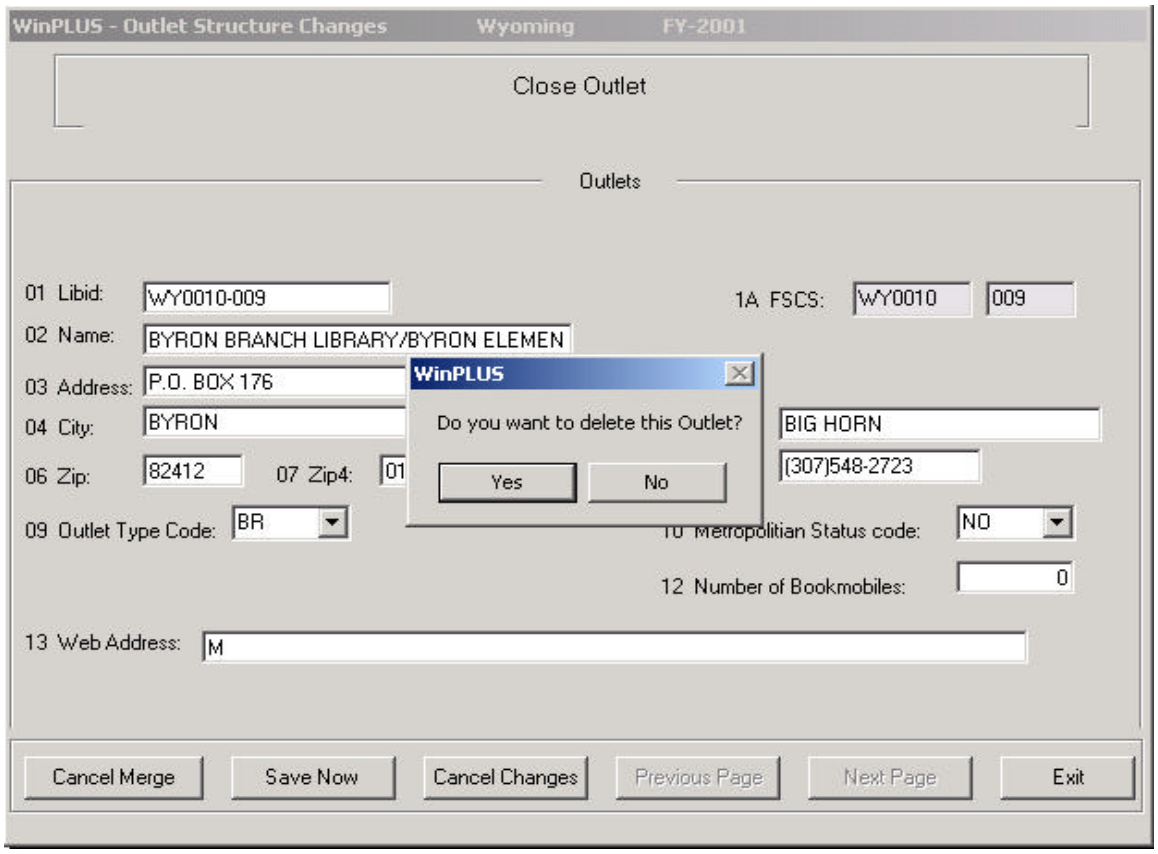
The 'Merge Outlet' data entry screen will be displayed for the newly merged outlet. Please enter the data for the newly merged outlet as explained under section 5.7.2—Add New Outlet, and then select 'Save Work' or 'Exit' to save the new outlet record, or select 'Cancel Merge' to cancel the structure change and return to the 'Outlet Structure Changes Menu'.

5.7.5 Delete Closed Outlet (Library did not merge or change)

To delete a closed outlet, select 'Delete Closed Outlet' from the 'Outlet Structure Changes Menu' and select 'Continue'. (Note: The closed outlet record is deleted, tracked in the historical database under its original FSCS ID#, and can later be restored. See section 5.7.8—Restore Previous Deletion.)



Next a list of all outlets is displayed. Select the outlet that will be deleted by clicking on the gray box to the left of the name. *The entire row must be highlighted*. Select 'Delete Outlet' to proceed. A window showing the outlet record is displayed with the message 'Do you want to delete this Outlet?'



Select 'Yes' to delete the closed outlet record. Select 'No' to return to the 'Outlet Structure Changes Menu'.

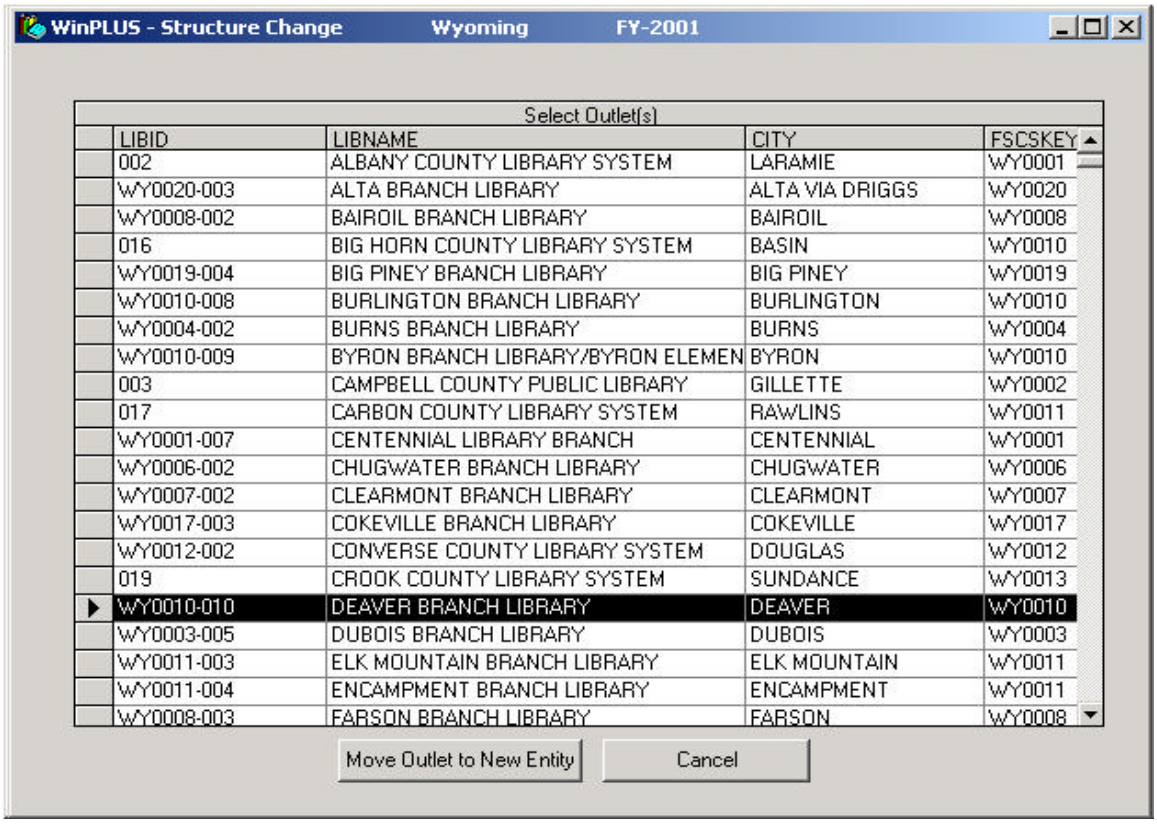
Note: If an outlet closes temporarily, the user should:

1. Close the outlet using the 'Delete Closed Outlet' option from the 'Outlet Structure Change Menu'.

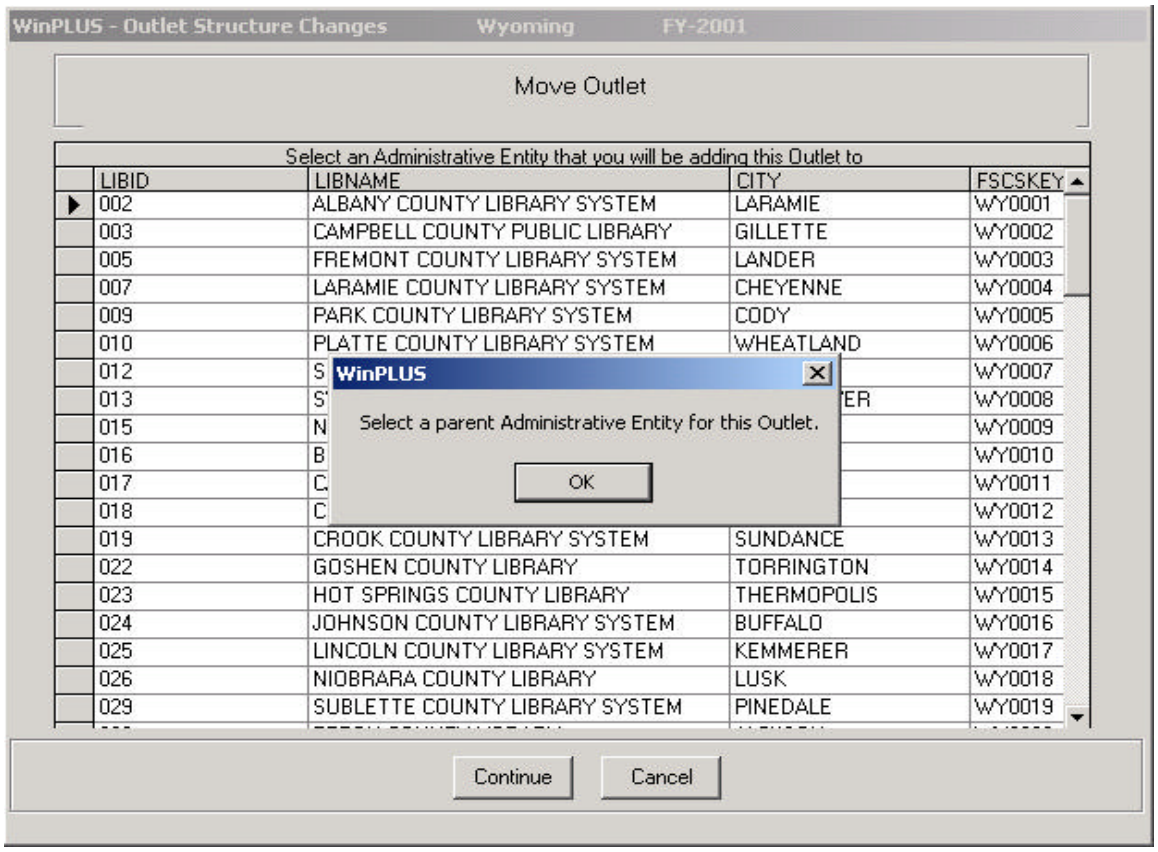
2. When the outlet reopens, restore it using the 'Restore Previous Deletion' option from the 'Outlet Structure Change Menu'.

5.7.6 Outlet Moves to New Administrative Entity

To move an outlet record to a new administrative entity, select 'Outlet Moves to New Administrative Entity' from the 'Outlet Structure Changes Menu'. (Note: The outlet move is tracked in the historical database under its old FSCS ID# and under the new administrative entity's FSCS ID#.)



Next, a window listing all outlets is displayed. Select the outlet that will be moved to a new administrative entity by clicking on the gray box to the left of the names. *The entire row must be highlighted*. To proceed, select 'Move Outlet to New Entity'. Next, the user is prompted to 'Select a parent Administrative Entity for this Outlet.' A window listing all the administrative entities is displayed.

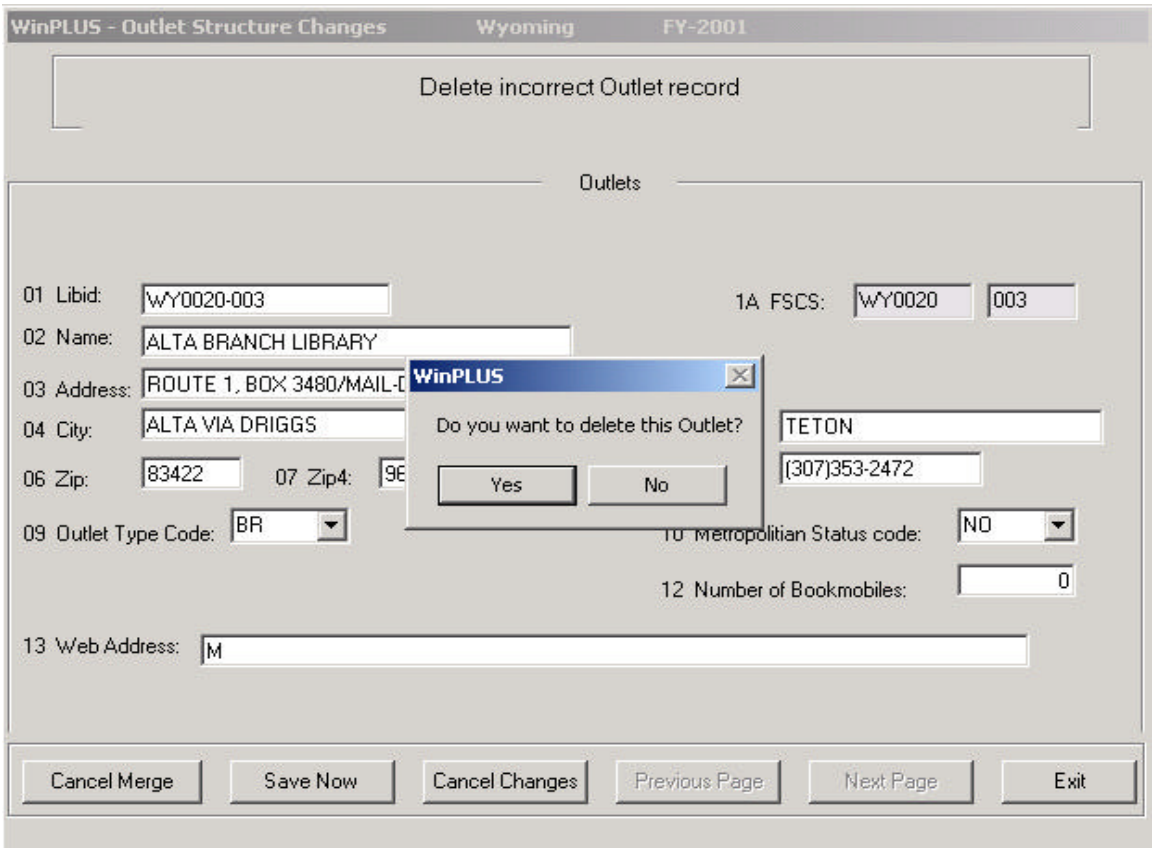


Select the administrative entity to which the outlet is moving by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Select 'Continue' to finalize the structure change.

5.7.7 Delete Incorrect Record

To delete an incorrect outlet record, select 'Delete Incorrect Record' from the 'Outlet Structure Changes Menu'. (Note: The deleted outlet is tracked in the historical database under its original FSCS ID# and can later be restored. See section 5.7.8—Restore Previous Deletion.)

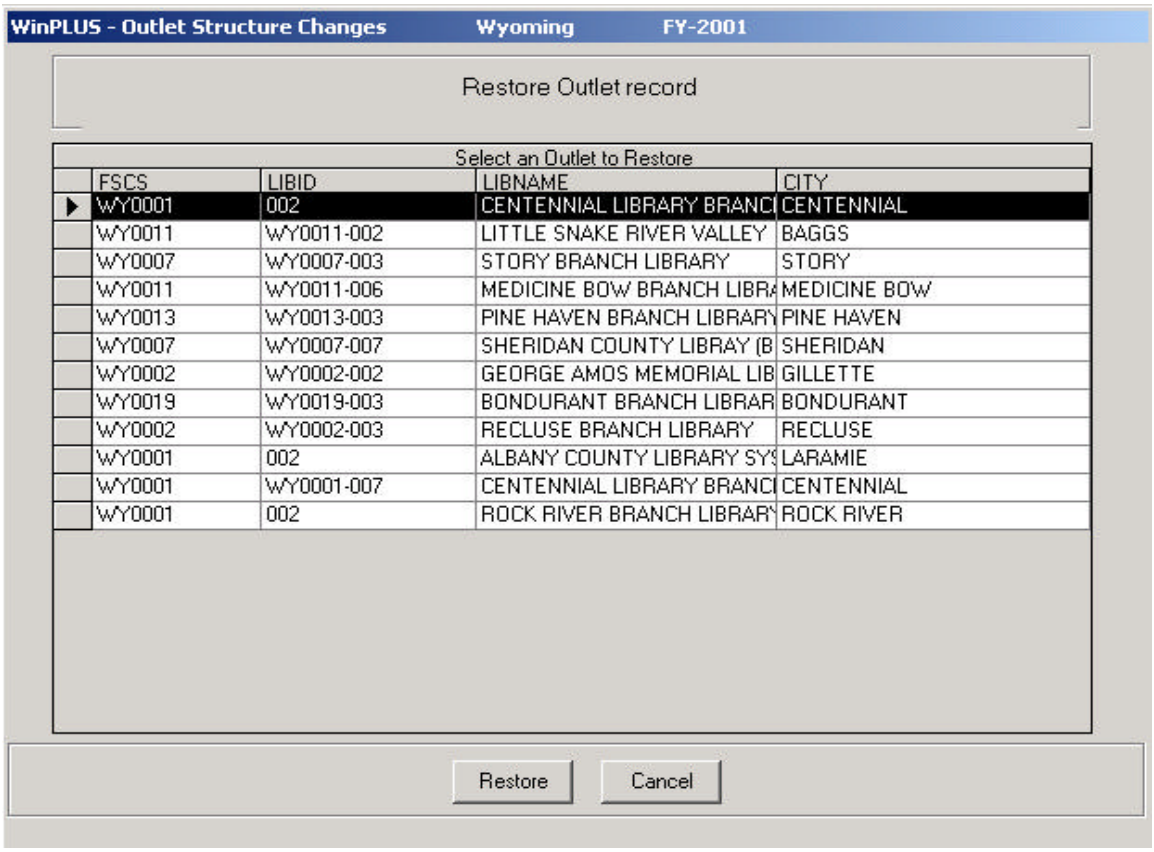
Next, a list of all outlets is displayed. Select the outlet that will be deleted by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Select 'Delete Outlet' to proceed with the structure change. Next, a 'Delete incorrect Outlet record' data entry screen is displayed with the message 'Do you want to delete this Outlet?'



Select 'Yes' to confirm the deletion, or select 'No' to cancel the structure change and return to the 'Outlet Structure Changes Menu'.

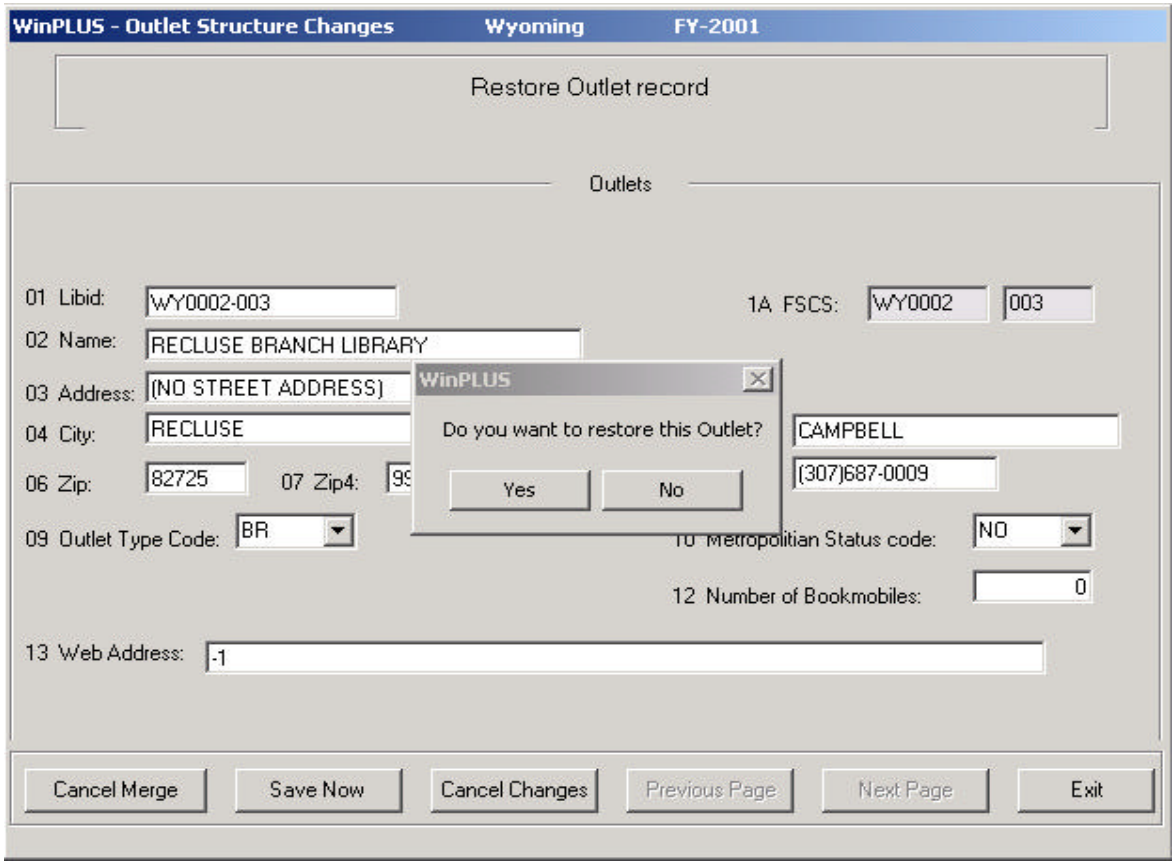
5.7.8 Restore Previous Deletion

To restore a previously deleted outlet, select 'Restore Previous Deletion' from the 'Outlet Structure Changes Menu'. (Note: The deleted record is restored from the historical database and becomes a current record in the outlet database. The outlet's old FSCS ID# is retained.) A list of outlets that may be restored is displayed.



Select the outlet that will be restored by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Select 'Restore' to proceed with the structure change.

Next, a window showing the outlet is displayed. The user will be asked 'Do you want to restore this Outlet?'



Select 'Yes' to continue with the restore. Select 'No' to cancel the restore and return to the 'Outlet Structure Changes Menu'. When the user selects 'Yes', the outlet record is restored from the historical database and again becomes a part of the outlet database under its original FSCS ID#. The 'Outlet Structure Changes Menu' is then displayed.